Data Governance and quality	Description
Data standards	Vendor discussions, decisions, and implementation/updates on data standards (e.g., FHIR/IHE_HPD, REAL-D, Taxonomy, USPS), data dictionary, data models, code sets, and other related areas
Data quality scoring mechanism	(Contributes to an overall score and outlier processes) - Definitions of metrics that evaluate the overall condition (accuracy + completeness) of the Provider Directory and the individual provider records - Classifies the degree of data accuracy based on data's completeness, age, relationship of the source to element, verification, and consistency/agreement across other sources
Data curation policies/activities	*Evaluation and selection of data sources for inclusion; data audit and validations, strategies, scope, processes (e.g., which sources are used to validate certain types of data), and other data validation requirements (such as frequency of audits, triggers for audits); documentation of which data sources provide which elements and identifies where gaps exist; definition of "complete" data set for a provider - Monitoring and analyzing federal, state, and other PD regulations for required PD elements and policies, identify gaps, decide on potential changes
Data survivorship and matching policies	*Hierarchical data matching construct based on data quality characteristics, prioritizes which data feed a golden record and policies for how data that have a lower quality threshold are handled by staff *Set of criteria that define what constitutes a match, a possible match, and not a match; unique identifier criteria for providers in the directory *Matching criteria for affiliations of provider to their affilaited practices as well as organizations to organizations hierarchies
Data security policies	Set of policies and protocols that establish monitoring of the directory for proper use, authorized access, security of the data, and archival/backups of the data
Data access policies	Set of policies for who can access the data, how, and for what purposes to get data; includes data use agreements, participation agreements, and privacy notices/disclosures
Policies to author data	Set of policies for provider authored information into the Provider Directory; includes who can enter data (roles) and what type of ability they have - add, edit, "delete"; also includes which data fields require PD to be the original source of information (e.g., "accepting new patients"), frequency of updates, and other functionality necessary
Develop data governing bodies	*Program/data governing body(ies) that manages and resolves issues, monitors the activity and progress according to the sustainabilty plan, makes decisions, updates and maintains rules and policies; informed by a PD user group; * PD User group comprised of users who discuss issues and propose enhancements to improve the usability and usefulness of the PD
Program sustainability and funding	**Description**
Develop program sustainability plan	*Plan to maintain the value, use and relevance over time - includes elements of Medicaid funding and non-Medicaid cost share, who are the expected users and what use and adoption targets need to be met, what needs are being met today and how the environment will be monitored for continued updates and changes
Medicaid funding approval	Current I-APD approval is to support Medicaid enterprise (As of September 2017, pending approval on definition of who falls under the Medicaid definition)
Develop cost model/share of non-Medicaid use	Once known who is included within the Medicaid definition (who's in), includes work with MiHIN to understand costs for non-Medicaid share, explore use beyond Medicaid and costs; get buy-in from stakeholders (market the value and ROI), develop fee structure and amounts, propose to CMS
Market Analysis	**Description**
Detailed use cases	Update existing use cases to reflect details of how the PD must function or data it must contain to be useful; Identify the processes elminated or streamlined for each use case
Value models and costs; mechanism to assess a return on investments	Work with MiHIN to understand additional costs - work with stakeholders to assign a value (savings) to eliminated processes or efficiencies as well as costs to adopt
Determine the benefits that sell	Work with stakeholders to finalize key points and tangible benefits; may include market scan/state or the market
Identify high level ambassadors, spokespeople, key stakeholders and champions to communicate to broader audiences	Work with stakeholders to identify who we should work with and what tools/materials are needed
Adoption planning	**Description**
Establish and measure adoption phases	Analyze which data sources, providers, functions, and features will be in the PD at certain phases and categorize target audiences for each phase, including soft launch (aka "early release") - implementing to a small group of early adopters to use, measure, and evaluate prior to full release
Establish target audiences and messages	Identify general "role levels" within organizations to tailor content messages; Specify the appropriate audience members within the targeted audiences and tailor messages to their roles (who are we targeting and what do we need to tell them); Identify and sign up users within groups that work together
Marketing and Outreach	**Description**
Present and report progress to advisory groups and key associations	Determine which groups need updates via presentations, demos, and reports
Convene Stakeholder meetings	Current PDAC/SME meetings are every other month, may need to adjust to meet needs
Update Provider Directory website	
Updates on PD through newsletters, e-blasts, and media stories	Identify newsletters/media to produce stories to certain audiences, schedule for e-blasts, and content for each

Utilize partner organizations for communications	Identify and send communications and stories through these organizations; meet with them to provide updates (or email if appropriate)
Send PD stories through OHA health transformation and provider newsletters	
Communicate through OHA social media outlets	Consider facebook and twitter
User Acceptance testing (UAT)	Solicit and use stakeholders (PDAC/SME, others) in UAT
Conduct user training sessions and create user guides	Likely will be online trainings/online help manuals
Create toolkit for PD champions	Train spokespeople and champions on key messages and provide supporting materials
Fact sheets and FAQs	Update FAQs and fact sheets, post to website/distribute
Participate in local, state, and national conferences to speak and share PD information	
Direct mailers	Identify stakeholders and interested parties for direct mailers, develop content for mailers
Initiate branding for new product	
Conduct targeted outreach and promotions	Catch - all - Provide demonstrations to prospective users

Draft PD Adoption Action Plan 9-2017

Category	Subcategory	Now - Mid 2018	Mid 2018 - Early Release	Full release - Post Launch	Artifacts and Milestones
Policies and Governance	Data standards	Analyze data standards	Define/Implement data standards	Updated data standards	1. Implementation guides 2. Operations and policy manuals
	Data quality	Analyze data quality scoring metric	Define data quality scoring metric	Updated quality metric	1. Implementation guides 2. Operations and policy manuals 3. Quality reports 4. Documented operational/system processes, translated to a mechanism that stakeholders understand
	Data curation	Monitor PD regulations / Analyze/select 1st data sources / Draft data auditing and validation strategies	Analyze/select next data sources / Test/Onboard data sources		1. Documented data sources and audit strategy (validation) 2. Published implementation guides and materials for users and potential users
	Data survivorship and matching	Analyze/define data survivorship and matching algorithms / Draft data auditing and validation strategies	Implement data survivorship & matching algorithms		1. Documented operational/system processes matching criteria, data hierarchies, and what are considered outliers 2. Published implementation guides and materials for users and potential users
	Data security/ privacy	Analyze data security policies	Draft/Implement data security policies	Update data security policies	1. Documented audit and security processes and protocols that comply with all SLAs and established RFP/scope of work requirements 2. Published guides and materials for users
	Data access	Analyze role based access policies / Draft data use	Finalize/Implement role based access policies / Execute data use agreements/disclosures		1. Finalized data use agreements and user agreements 2. Finalized data disclosures for data contributors have documentation of what data can be shared and how it can be used
	Policies to author data	Business analysis and documentation / Policy analysis and documentation	Test and implement / Implement data entry policies	Implement in PD solution	1. Documentation of business need for data fields, data models, business processes, and needed policies 2. Documented operational policies 3. User manuals that describe processes for entering information and how to gain access
	Data governing bodies	Monitor HIT Commons / Analysis/Draft governance	Draft/final governance / Convene governance bodies		1. Governance board/body structure/scope 2. User group and governance board charter 3. Convene meetings
Sustainability	Program sustainability plan	Analyze/draft program	Draft/final Program	Execute Program	Plan to maintain the value, use and relevance over time
	Medicaid funding approval	Draft and finalize Medicaid enterprise			Approved I-APD funding from CMS, including the definition for Medicaid for the Provider Directory - as it relates to who is included in the Medicaid enterprise
	Non-Medicaid Cost model/ share	Non-Medicaid cost analysis / Research non-Medicaid interest/buy-in	Discussions and approvals from CMS on cost model		Updated I-APD funding for non-Medicaid use
Market Analysis		Draft detailed use cases / Develop ROI valuation / Draft/final benefits documentation / Identify champions/spokespeople			1. Updated use cases 2. Defined cost savings valuation methodology 3. List of stakeholders, ambassadors, spokespeople and champions 4. List of what tools are materials are needed to support them
Adoption planning		Analyze/draft adoption phases/audiencess / Develop messages for target audiences	Early adoption begins		1. Matrix of data, providers, functions available and who target audiences are 2. Adoption goals
Marketing and Outreach		Present to advisory bodies / Convene stakeholder groups / Update website / Identify partner orgs for news outlets / Create Champions tool kit / UAT / Create/update FAQs and fact sheets / Identify opportunities and present in national and state conferences / Initiate branding	Convene user groups / PD newsletter stories, blasts, direct mailers, media stories, social		1. Presentations and reports 2. Updated website 3. List of newsletters to publish in/schedule for e-blasts/finalized content/sent communications 4. List of UAT testers, UAT plan, UAT completion 5. Demos to prospective users and stakeholders 6. Updated FAQs and fact sheets 7. Participation in conferences 8. Provider Directory branded materials